

*Bill  
Munberg*

HISTORY

State Universities Annuitants  
Association  
(1970-1988)

*by  
Joe Sutton & Dale Greffe  
until Fran Johnson was President*

On the rainy afternoon of April 1, 1970, retirees of the University of Illinois at Urbana-Champaign gathered in the Law Building auditorium to form an organization to represent their interests as annuitants.

Secretary Mary Lois Bull counted 125 persons present, blaming the downpour for what she considered a small attendance; recorded the adoption of a constitution and the election of an executive committee; and, after reporting on other business, closed her minutes with a notation that the Executive Committee--apparently not a group to dally--would come together for its first meeting in just ten days.

In reality, these organizational moves were far less precipitate than they might appear. A score of retired faculty and staff members plus a number of concerned active employees had been involved for a year or more in pursuits that led to formation of what today is formally identified as the State Universities Annuitants Association: University of Illinois Urbana-Champaign Chapter.

Although this account of the chapter's conception and development is being put together only 18 years after its birth, the compilers find it difficult to determine parentage. Facts quickly fade; sources disappear. As an annuitant from another campus once wryly observed, "There is nothing so fragile as the membership list of an organization of retirees."

Who created our organization? One person currently active in the group remarked casually that much credit probably should go to the campus chapter of the American Association of University Professors. Another countered with the view that if the AAUP had done its work the organization would have been unnecessary!

Understandably, aims of active employees and of those retired and drawing annuities are somewhat different when it comes to helping the state

legislature decide how to divide up available revenues. Materials in the files establish that an AAUP committee on emeriti was mounting a statewide effort as early as the 1950s to improve the lot of pensioned educators and their survivors. Leaders in that movement were among those active in the establishment of the Annuitants Association a decade later.

For this brief history, the authors have relied primarily on minutes of the monthly meetings of the Executive Committee from 1970 on into 1988. Thanks to University Archives and a few valued board members of the past who never threw anything away, most though not quite all of the minutes were available.

-----

The Urbana-Champaign chapter of the State Universities Annuitants Association owns the distinction of being older than its parent, which came into being in Springfield on November 17, 1971--nineteen months after the University of Illinois unit was organized. Furthermore, the first president of the state organization was David E. Lindstrom, a key member of the small group whose efforts led to formation of the pioneering Urbana chapter.

In April 1969 Lindstrom had sent 28 of his campus colleagues a note which contains hints of matters that were of then-current concern and identifies influential individuals who were trying to do something about them. It reads, in part:

"For those of you who did not get to come to the AAUP Urbana Chapter meeting on April 8, 1969, this may be of interest. But you should know, first, who started this; it was Charles L. Stewart who first made contact with Rubin Cohn (a law professor) about action the Pension Laws Commission was about to take. Then Charles left for Florida for three months, and Ray Shawl took over to chair the first meeting with Dr. Cohn. . . .Then Ray went

off to New Mexico and when I returned from Hawaii I arranged for the first meeting with Dr. Cohn after the commission had met and acted. . . .My last letter was to all whose names had been given me, announcing the AAUP meeting at which Mr. Gibala (executive director of the State Universities Retirement System) reported on progress in the framing of a bill. So I feel I must turn this thing back to Charles again . . .

"The important thing is that the bill has been introduced. . . .After reading the bill you will realize that a movement has been made toward adjusting annuity payments for those already retired, even though only for 1 1/2 percent per year. It is quite possible, now, I feel, to move ahead from this point to make the adjustment fit in with the changing living costs; but that is for the future. We can, if it seems necessary, work together to get passage of the present Senate Bill No. 923."

The following October a letter went out to all University of Illinois retirees living in the area, urging them to attend an October 27 meeting in the Illini Union Faculty Lounge. Its purpose? Senate Bill 923 had indeed been passed and signed into law, marking "a new day," and the retirees were being given this opportunity "to meet one another and especially to extend a personal vote of thanks to those who were instrumental in the successful results obtained." 1969

There was reason for gratitude. S.B. 923 established for the first time a statutory annual increase in pensions.

Signing the letter of invitation were eight individuals, including Lindstrom and Stewart. They were not only grateful, but also optimistic. "Such success makes it possible to look forward to other benefits which might come in the future," they wrote. "Some of these are listed below. This meeting may offer an opportunity to discuss these matters in some detail, especially those that deserve prompt consideration."

Suggestions included a more favorable pension adjustment to living costs, better treatment of surviving spouses and a reduction in the number of years of employment required to earn full pension coverage.

A final agenda item asked for response as to the desirability of setting up a committee to call another meeting.

The October 27 gathering attracted approximately 150 retirees, some with spouses. Lindstrom presided and Stewart spoke, comparing the new legislation to "a Northwest Passage opening a route to improved benefits." Agenda items dealing with pension matters were discussed, along with an idea for "a campus retirement and creative-living center" and, as the last item, "a retiree interim committee."

Mary Lois Bull as secretary of the called meeting reported as follows on this last agenda item:

"A committee of ten to serve as a liaison between the retirees and various officials was approved with authority to call meetings as needed and to have financial assistance. Nine members were named to the committee; a tenth will be named later. Those appointed: H. K. Allen, Mary Lois Bull, Rubin Cohn, Mrs. Olive Remington Goldman, Leslie James, David Lindstrom, Ray I. Shawl, Charles L. Stewart and E. L. Stouffer. The name of Charles M. Allen also was proposed. Represented on the committee are academic and nonacademic retirees, an active member of the faculty and a retiree's beneficiary."

In her closing paragraphs Miss Bull reported that James "expressed the gratitude of the retirees to Charles L. Stewart and David Lindstrom for 'arranging this worthwhile meeting.'"

Then, perhaps to remind the assemblage that there's no such thing as a free lunch, Chairman Lindstrom announced that the cost of mailing two

newsletters to the retirees had been \$187, "advanced from the personal funds of the retirees who prepared the letters. He requested that Charles Stewart, acting for these retirees, receive any contributions." Adjournment followed.

Were it not for Mary Lois Bull's detailed minutes, the history of these antecedents to the Annuitants Association would be much less accessible than it is. Leafing through files of minutes in University Archives one finds that the "University of Illinois Retirees' Meeting" of October 27 was followed by a meeting of the "Retirees' Committee of Ten" on December 6. Eight of the ten gathered in the Stewart home. H. K. Allen was absent, and Cohn had sent word that, because of his involvement with the state Constitutional Convention, he would be able to serve only as an informal consultant. 1969

The Committee of Ten continued discussion and possible action pertaining to matters brought up at earlier meetings, and took steps toward a still more formal organization. "This is highly desirable," as Secretary Bull recorded prevailing sentiment, "with dues and a newsletter containing information of value to all retirees." The committee decided to increase its own size to twelve, and to delegate three of its members to draft a statement of purposes and a constitution. Also, "Mr. Lindstrom suggested support for the Retirees' Association by other campus organizations in the state such as the AAUP."

Mrs. Bernita Davies accepted an invitation to join the committee, filling the vacancy created by Cohn's withdrawal, and Clifford James agreed to replace Leslie James, who had found he would be unable to serve. Carrie McGreevy joined the committee in January, and Fred H. Turner in February, finally bringing the panel to its intended strength of twelve. (For all committee rosters, see appendix.)

By mid-January 1970 Stewart was able to report that the fund appeal of the previous fall had brought in from appreciative retirees \$72 more than was required to pay bills. Hence, need had been created for another officer, a treasurer. Miss Bull found her duties expanded to encompass this added responsibility, "to be custodian of and dispense contributions or future dues."

Such small-scale financing may have been prophetic. Though the chapter treasury had increased greatly as its second decade drew toward its close, at the time this sketch was written dues had been kept low and money matters still were not a major concern.

On January 30, less than two months after the suggestion for a constitution was heard, Charles Allen and Olive Goldman presented a draft document. One amendment was made to the draft, fixing dues at \$2 a year, and a meeting of all area retirees--520 in number--was set for April 1 to vote on the compact.

Without waiting for formal organization of retirees to be realized, the Interim Committee began to lobby on several fronts. Committee members were delegated to attend hearings on the rewriting of the state constitution, the principal concern being to support a provision on vested pension rights. And, Stewart had produced a letter "for mailing to various organizations in support of the pension rights provision." Help in the lobbying effort was to be solicited from "an AAUP or other official at each of the Illinois sister institutions."

Providing advice in composing the letter was Edward S. Gibala, executive director of the State Universities Retirement System, upon whose guidance the retirees' committees had relied heavily from the beginning. The committee earlier had approved Gibala's draft of a provision on vested pension rights to be considered by the Constitutional Convention.

(This letter and others that followed seem to have been important factors in the formation of annuitant chapters at other schools. In his history of the Carbondale chapter of SUAA, Charles C. Clayton observed:

("Sometime during the late summer of 1971, Col. MacMillan was contacted by the University of Illinois [sic] relative to the formation of an Annuitants Association of the State Universities Retirement System of Illinois. Plans were for a chapter on each state campus. He was asked to help organize a chapter for Southern Illinois University at Carbondale. MacMillan was enthusiastic about the plan and mentioned that over a period of several months he had worked on a similar plan for the SIUC campus and had submitted a report to the president."

(The Carbondale chapter adopted its constitution and bylaws on February 23, 1972, "patterned after the state constitution and the constitution of the University of Illinois Annuitants Chapter.")

One section of Urbana's proposed Annuitants Association constitution stated:

"The affairs of the organization shall be administered by an Executive Committee of twelve members. The members of the Interim Executive Committee, whose terms of one to three years have been determined by lot, shall serve until they are replaced by election." The drawing of lots was accomplished at the Interim Committee's meeting of February 12, 1970, with the following results:

Members whose terms would expire in 1970--C. L. Stewart, Mrs. Bernita Davies and Ray Shawl; in 1971--David Lindstrom, Charles M. Allen, Mrs. Olive Goldman and Carrie McGreevy; in 1972--Mary Lois Bull, H. K. Allen, Clifford James, E. L. Stouffer and Fred Turner.



Lindstrom, acting as chairman pro tem for Stewart, signed the announcement of the April 1 organizational meeting addressed to "members of the University of Illinois retired academic, nonacademic and allied organizations staff in the Champaign-Urbana area." Summing up the Interim Committee's history, the meeting notice explained:

"At the October 29, 1969, meeting of the retirees an Interim Committee was authorized to plan for a permanent organization and recommend action on matters pertaining to retirees' welfare. This Committee of Twelve has met biweekly since then and among the items discussed were the following: The twenty-year service requirement for participation in the annual annuity increase, increases for surviving beneficiaries, constitutional authority for cost of living increases, changes in the State Income Tax Law, strengthening the funding of the State-administered Retirement System and the creation of a campus retirement and living center."

Lindstrom presided at the April 1, 1970, meeting that marked the formal birth of the Urbana-Champaign Annuitants Association. He introduced, along with the Interim Committee, Harl Ray, "a Plant and Services staff member and a member of the University Retirement System Advisory Committee, who has been helpful to the Interim Committee."

Help was promised from other quarters as well. Lindstrom reported that Prof. Walter H. Franke of the Institute of Labor and Industrial Relations, chairman of the Senate Faculty Benefits Committee, would assist the retirees' organization, and that Prof. J. Nelson Young of the College of Law, a member of the University Retirement System Advisory Committee, would be available as a consultant.

In the business meeting, the retirees adopted the proposed constitution (see appendix) and approved the slate of nominees for four vacancies on the

Executive Committee. Mrs. Bernita Davies and Ray Shawl of the academic staff were reelected; Miss Marion Berry and Everett Smith, both of the nonacademic staff, were elected as new members.

In a talk indicative of the type of information program that would interest the retirees in their meetings in the years ahead, James R. Gallivan, University insurance manager, explained the U. of I. hospital insurance plan and its relation to the Medicare program.

With that the Interim Committee slipped into history; its creation, the University of Illinois, Urbana Campus, Annuitants Association, was on its way. At its next meeting the Executive Committee reelected Chairman Stewart, Vice Chairman Lindstrom and Secretary-Treasurer Bull. Miss Bull reported that she had opened an Association account in First National Bank with a deposit of \$216. Proving itself a fair-minded institution, the bank waived its customary service charge for small checking accounts, reasoning that since individual depositors over 65 escape the charge, an organization of such individuals should escape it as well.

-----

Eighteen years have passed since the birth of the State Universities Annuitants Association: University of Illinois Urbana-Champaign Chapter. (For obvious reasons, note-takers and writers generally are likely to identify it as "SUAA-UIUC," the simpler if less dignified and certainly unpronounceable acronym.)

How well has the organization done in its continuing effort to represent the interests of University of Illinois annuitants and their spouses? Pension payments have been increased, but not to the extent sought. Coverage has been broadened. Miscellaneous benefits have been realized, perhaps of no great financial worth but valuable nonetheless;

among the greater accomplishments certainly must be counted the creation and maintenance of a community of individuals active not only in promoting their financial interests but in enjoying each other's companionship as well, in person and, through publications, nationwide.

We do not act alone. The State Universities Annuitants Association of Illinois has expanded to include a dozen separate chapters, and continued growth is assured. Among reports given at a state board meeting in Urbana in October 1987 was one to the effect that Olney Area Community Colleges were forming a chapter, and that "interest was noted, too, in other community college areas."

Perhaps the most significant facet of organizational activity as SUAA approached its third decade was an effort to strengthen the state office with a permanent headquarters, a paid executive and, perforce, increased member fees to make these developments possible.

Presumably, objectives of the state organization and of the individual chapters will remain essentially unchanged. As stated in SUAA literature, these objectives are:

"To increase the effectiveness of the organization in supporting favorable legislation; to inform members about legislation important to retirees; to study ways to improve publicity concerning SUAA; to seek cooperation of other interested groups without entangling alliances; to work closely with the Pension Laws Commission, especially on input; to increase Annuitants Association chapters and membership; to work for more adequate funding; and, to encourage each of the state institutions and agencies covered by the State Universities Retirement System of Illinois to provide adequate personnel to deal with the needs of pre- and post-retired persons and survivors."

As its achievements, the state organization lists "increased association chapters and memberships, increased effectiveness in such activities as supporting favorable legislation, and advancing the interests of retirees with such groups as the Pension Laws Commission, the Retirement System, and the General Assembly."

Two-way cooperation with the State Universities Retirement System (SURS) has increased the effectiveness of the Annuitants Association from the beginning. Though SURS' area of responsibility is broader than that of SUAA, both labor in the same vineyard. A chapter brochure puts it this way:

"The primary purpose of the State Universities Annuitants Association is to promote the interests of its members by improving the benefits and funding of the State Universities Retirement System. The Association works toward this objective in two ways--

- "1. By supporting and improving bills which have been initiated and introduced in the legislature by the board of trustees of SURS. Much of this legislation does not affect current retirees but concerns the operation of the system and the present employee benefits.
- "2. By initiating and seeking sponsorship of legislation providing benefits for current retirees and survivors over and above that which the board of SURS has seen fit to sponsor and which the Association considers reasonable to request."

A note of explanation about the State Universities Retirement System may prove helpful here. As reported in a history of SURS, the Illinois General Assembly established the agency in 1941 under "An Act to provide for the creation, maintenance, and administration of a Retirement System for the benefit of the staff members and employees of the University of Illinois and of certain other state educational and scientific agencies."

In 1961 the title was amended by deletion of the reference to the University of Illinois and substitution of the phrase "state universities and certain other state educational and scientific agencies" because, it was said, many legislators and state officials were under the impression that the Retirement System covered only the faculty and staff of the U. of I. rather than all state universities, colleges, scientific surveys and other related agencies.

In addition to those discussed here, several other instruments of state government and a cluster of volunteer organizations serve a common purpose, to enhance the security of their clients in their retirement years. Assigning credit for successes and blame for failures may be as pointless as it is difficult, and the primary purpose of this historical account is simply to record, before it is too late to do so, what has been contributed by the State Universities Annuitants Association: University of Illinois Urbana-Champaign Chapter, in its first two decades.

Addressing the first annual fall meeting in October 1970, Chairman Stewart mentioned the 1 1/2 percent annual increase in pensions and told of the Annuitants Association's work with the Retirement System and certain other state organizations in an effort to have the new state constitution include a clause to protect state retiree pension rights.

Stewart related that the organization also had assisted annuitants with individual problems related to their retirement. (Parenthetically, it should be explained why though the more common term is "retiree," the organization is called an association of "annuitants." Retirees, obviously, have worked for the University; spouses and children who never did so may be receiving annuities, and thus are annuitants.)

In a more surprising part of his report, Chairman Stewart noted that the chapter had declined an offer of financial aid from the University administration "since it was felt that for the present the Association could finance its activities and is independent of restrictions which would be imposed by the University." Perhaps such a stance was encouraged by the fact that Secretary-Treasurer Bull's initial deposit of \$216 in First National Bank already had increased to \$786.70.

One of the more notable events of 1971 was the formation of the state association, accomplished at a meeting in Springfield on November 17. More than a year earlier David Lindstrom and others in the Urbana-Champaign organization had agitated for a "statewide council which would be alert to retirees' needs and act in their behalf." Lindstrom, then chairman, and Charles M. Allen, vice chairman, were appointed the official delegates from SUAA-UIUC, and Lindstrom was elected state president. "All the state campuses now are organized," it was reported, and state dues of \$1 per chapter member were levied.

With his election as state president, Lindstrom resigned the local chairmanship, and Ray Shawl subsequently was named to succeed him in this position.

While the statewide organization of annuitants was encouraged, those at Urbana-Champaign were wary of losing their independence, and, in one of its first acts in 1972, the Executive Committee adopted this recommendation:

"That the Champaign-Urbana Annuitants Association and the Illinois Annuitants Association be completely independent from any university or from another annuitants' association but that close liaison relationships be maintained."

This did not mean the Annuitants Association wanted nothing from the University. In March 1972 President John Corbally, in response to his request for guidance, received from the local chapter a list of 23 items for his University Committee on Retiree Benefits to consider.

In the following fall Chancellor Jack Peltason took an action that has been of inestimable value to the Urbana-Champaign chapter. Responding to a suggestion made by Charles Allen, he appointed a member of his staff to serve as liaison between the campus administration and the retirees. The appointee was Dan R. McClelland, an assistant to the chancellor. His duties were "to assist retirees in necessary relationships with campus departments and offer advice on retiree problems when needed."

An example of service rendered to retirees through SUAA efforts came in July 1973 when the chapter organized a meeting to explain current changes in health insurance benefits. An estimated 225 retirees and spouses attended. Participating in addition to chapter officers were Donald Hoffmeister of the State Universities Retirement System, James Gallivan of the University Insurance Office and Professor Robert Mehr of the Finance Department. Many such information meetings were to follow in the years to come.

In his report to the state association in October 1973, President Ray I. Shawl said that the Urbana chapter had 650 paid members, including "a number of spouses." He noted that this total was half of the 1,300 retirees from the Urbana-Champaign campus, "about 700 of whom live within driving distance of the University."

The Urbana-Champaign chapter was honored at the October meeting when Charles W. Sanford was elected state president, becoming its second representative to hold the office in the state organization's three years of existence.

At the start of 1974, the report of Secretary-Treasurer Mary Lois Bull indicated that membership in the local chapter had very nearly reached a "steady state." She counted 1,300 retirees, 714 living in the immediate Champaign-Urbana area, 11 in foreign countries. "There are 634 paid members, including 151 spouses and six survivors. In addition 102 members have made additional contributions." She reported a bank balance of \$3,732.77 with no bills outstanding, and noted that "high postage is the major expense in issuing newsletters."

In his report to the annual meeting that fall (1974), Shawl lamented that the year "has been one of hard work and disappointment for our Association." It had been difficult to get SUAA legislation signed by Governor Dan Walker, he said, adding an observation that was to be repeated often in the future:

"Until we get a funding bill signed by the governor there is little chance of our Association getting any additional money increases for its retirees."

But, Shawl's report was not entirely pessimistic. "One of the most important accomplishments of our Urbana chapter," he wrote, "has been the inclusion in the new <sup>1970</sup> Illinois constitution of an article protecting all state pension systems." The provision, Article XIII, Section 5, Pension and Retirement Rights, follows:

"Membership in any pension or retirement system of the State, any unit of local government or school district, or any agency or instrumentality thereof, shall be an enforceable contractual relationship, the benefits of which shall not be diminished or impaired."



Such a vested pension rights provision had been a goal vigorously sought by Ed Gibala and SURS and, under his leadership, by the Urbana SUAA chapter.

Sanford assumed the chapter presidency in November 1974, and stressed that, as past state president, he felt that local chapters must work closely with the state organization and with their legislators.

At the December<sup>1974</sup> meeting, the year's last, Charles S. Havens reported that office space "and certain clerical facilities" were being provided by U. of I. president John Corbally for the local chapter.

The new year<sup>1975</sup> began with a target group of 1,561 annuitants reported by the Retirement Office, approximately 250 more than a year earlier. Chapter membership had increased to 934 (624 retirees, 249 spouses and 61 survivors).

Then-current thinking on a proper division of responsibilities in regard to protection of annuitants is revealed in a note from chapter minutes of March 12, 1975. Havens, reporting on activities of the executive board of the state association, said it was the consensus of the Executive Committee that the University administration and staff should assume responsibility for seeking to improve the funding of the system (SURS) and that the annuitants should take responsibility for working to increase the benefits for the older annuitants and survivors plus the cost of living adjustments.

In further discussion of the chapter's legislative program, Charles Allen observed that, in efforts to increase funding, it was important "to secure the support of the current active faculty and staff who upon their retirement in future years will be faced with a huge deficit in the retirement fund."

Action worthy of note in 1975 included this from the minutes of October 15:

"Honorary Membership. Miss Bull moved that after age 90, a retiree be made an honorary member and be sent a membership card. The motion was seconded by Mr. Neiswanger and passed."

Joseph E. Blaze, taking the president's chair, announced that new quarters for the chapter had been provided in 272 Administration Building. (Currently, the chapter's "home" is 364 Administration Building.)

What activities held the most potential interest for retirees in the mid 70s? Harvey W. Huegy reported these results of a questionnaire survey covering all University retirees:

Thirty-five respondents were interested in assistance with insurance claims, 23 in assistance with wills and estate planning, 16 in assistance with income tax problems, 8 interested in cost of living adjustment and 2 in opportunity to work. In the social category, 2 were interested in golf, 7 in bridge, 3 in sewing, 5 in dancing and 18 in group dinners.

Huegy assigned volunteers to work in the areas of largest response, and follow-up letters subsequently were sent to the respondents to facilitate fulfillment of their desires.

Attracting attention at the annual state meeting in November 1975 was a move to require that state and local government pension plans meet the same participation, vesting and financing requirements then applicable to private pension plans through federal legislation. Discussion of the proposal, H. B. 9155 ("Public Service Employees Retirement Security Act of 1975"), was, in Blaze's opinion, the real "meat" of that state meeting. The question was, How hard and in what direction to push federal legislation requiring states to match funding as required by law? One problem was that

the proposed legislation would subject the system to federal income tax, thus resulting in detriment to beneficiaries. The Huegy committee then was charged to draft a resolution which would support the principles and objectives of H. B. 9155 but request caution in the type of sanction to be applied so that it would not be to the detriment of those whom the measure was meant to benefit. This resolution was forthcoming:

"Resolved that federal legislation to protect the beneficiaries of public pension plans is as essential as legislation already applicable to private pension plans. In view of the inadequate funding of many public pension systems, this is a very serious problem. It is, however, especially difficult because of the lack of appropriate sanctions to obtain compliance and these should be drawn so they do not damage the beneficiaries it is designed to protect." In the view of many observers, the funding problem has never been solved.

As noted earlier, one interest of the individuals who created the Annuitants Association had been retirement housing for University personnel. That this interest remained alive several years later is evidenced by a note from the minutes of June 9, 1976:

"H. Huegy requested permission to use the annuitant list to send information about the Clark-Lindsey open house to be held on June 26-27. C. Havens moved and C. Sanford seconded a motion to grant this permission; motion passed."

Though a University-sponsored retirement home had never materialized, a private gift had provided the financial foundation for Clark-Lindsey Village, at this writing a thriving residential development in Urbana with a high percentage of one-time U. of I. personnel and alumni among its occupants.

The year 1976 was unusual in one respect: SUAA-UIUC remained inactive for more than four months that summer, at least insofar as records of the Executive Committee show. The chapter was properly represented at the state organization's annual meeting in September, however, and, as delegate Huegy reported on return, the most important business of that meeting had been the adoption of a new constitution. One change gave the organization a new name, State Universities Annuitants Association (Illinois), abbreviated SUAA. (Appendix.)

An increased emphasis on political effort was evident in 1977, under direction of the state organization. Dr. Marcy Bodine, SUAA president leading the effort, reminded chapters that they were expected "to become totally involved" in support of the Association's legislative program. One provision of that program was that legislative candidates be interviewed to decide whether they should be opposed or supported. Another was that "chapters should work toward the goal of employing a lobbyist, but this goal now appears to be several years away from realization." Though still being mentioned, no lobbyist had been hired at the time this historical account was compiled.

A document prepared for submission to the SUAA Annual Assembly to depict attitudes and goals for the legislative committee's 1977-78 program began thus:

"The chapter presidents have agreed that the primary function of the State Association is political and in this role it should initiate and expedite legislation approved by the members at the annual meeting."

The move in this direction intensified. In November, incoming president A. E. (Joe) Florio related to the Executive Committee these two proposals which the state president, Charles C. Clayton of Southern Illinois

University, had presented at the state meeting earlier in the fall: That the state association hire a lobbyist; and, that consideration be given to bringing into one body all of the state retirement systems.

The Urbana-Champaign chapter was unenthusiastic, then and later, particularly in regard to the merger issue; the Executive Committee voted unanimously against it. Committee members agreed it was too soon to resort to hiring a lobbyist--a "legislative representative." Alternatives had not been thoroughly considered; not enough information was available. The Executive Committee did, however, adopt a motion to the effect that if and when a lobbyist were employed the person should be the unanimous choice of all chapters of the state association.

At a state meeting in November, Clayton asked only for the appointment of a committee to study a merger, or "blending," of the pension systems. However, it was reported that he wanted to go ahead and present the proposal to the governor in December. Havens felt that doing so would be "objectionable and serious." Others agreed, expressing the sentiment that if anything were to be discussed with the governor it should be funding. The chapter voted that Florio should direct a letter to Clayton opposing any blending of the systems. The general feeling, obviously, was that any merger would weaken the position of University of Illinois annuitants, not strengthen it.

The lobbyist idea did not die. At the Executive Committee meeting in February 1978 it was reported that Clayton was trying to get the state association's constitution changed so that the board could appoint an executive director who also "would be a lobbyist paid by all of us." Hix Huegy, the minutes note, observed at this point that "at some point in time there might be a question as to whether the University of Illinois Annuitants Association, Urbana Chapter, should withdraw from the State Association." The

committee satisfied itself for the moment by reaffirming its position against both the appointment of an executive director and any blending of the retirement systems.

Subsequently, at the annual state meeting, a proposed change in the state constitution to authorize the president to appoint an executive secretary was defeated.

Later in the year the Urbana-Champaign chapter concerned itself with a subject much closer home--the need for help from some source for the increasingly burdensome task of maintaining chapter records and handling correspondence. This also was a problem that wouldn't go away; it was still unsolved in 1988--unsolved, that is, except by the continuing efforts of volunteers among the annuitants themselves, especially those serving on the executive committees through the years. "The annuitants' organization should grow as the number of annuitants increases, and a permanent office should be set up." That's from the minutes of June 28, 1978, and if valid then, it remained valid a decade later. Zelma Holl, then secretary-treasurer, "expressed her concern of the lack of understanding on the part of many members of the Executive Committee on the number of hours required to keep the records of the local chapter."

Selection of comfortable, convenient names for the retiree organizations seems always to have been a problem. In July 1978 the committee voted to rename the local unit "Urbana-Champaign Chapter, State Universities Annuitants' Association (Illinois)." This became one of the changes effected in a revision of the constitution approved by the chapter membership on September 30, 1978. Other changes opened the membership rolls to individuals who are within five (previously, one) years of retirement, and raised maximum annual dues from \$2 to \$4.

In other business at the annual meeting, SURS executive director Ed Gibala reported that the General Assembly had passed and the governor had signed into law a provision for an adjustment of one percent in the annual automatic increase in pension payments. This increase was the main item in the 1979 legislative program, and subsequently President Florio received a letter from Governor Thompson stating that he had signed the measure partly because of the UIUC chapter's support. There was other good news: Thompson had approved an appropriation of \$7.5 million for the Retirement System for reserve purposes over and beyond the state's share of benefit payout. As the minutes observed, "This does not correct the funding but it is a step in the right direction. Another \$79 million is still needed."

At Zelma Holl's last meeting as Executive Committee secretary Oct. 11, 1978, Florio presented her a \$500 E Bond as an honorarium on behalf of the committee.

In another staff matter as the year ended, Florio reported at the December meeting that Chancellor Gerberding had approved Dan R. McClelland as liaison and had cleared the way for preparation of the chapter newsletter in McClelland's office, allotting \$500 for this purpose. This was expected to make possible two issues a year, with circulation of about 2,800 copies.

-----

That brings the story up to midpoint in the chapter's life span. In the main, the last nine years, 1979-1987, have been a continuation of the efforts of the first nine, with some successes, some failures. In recent years the Executive Committee of the Annuitants Association UIUC conducts its monthly board meetings at Clark-Lindsey Village.

A highlight of the annual meeting in 1979 was the presentation of an engraved silver tray to Ed Gibala in recognition of his 27 years of

"outstanding services" to the State Universities Retirement System. David D. Henry, president emeritus of the University of Illinois, summarized the retiring director's career, observing that his efforts had brought "constant improvement in annuitants' and survivors' benefits." As a result, Dr. Henry said, SURS had become "a national model" for such retirement systems.

The year brought a new high in financial support for the chapter newsletter, the Office of the Chancellor contributing a total of \$1,000 for the two issues. Three thousand copies of the fall issue were printed, aimed at a mailing list of all retirees and survivors.

The organization continued to strengthen its financial position. Incoming president Wendell Miller began the year comforted by a balance of \$10,906.06--\$5,664 of that in cash resulting from the recent cashing of a CD. With "money market" ventures returning a high yield, the Executive Committee, true to its form through the years, moved to reinvest the sum "with a local broker giving high return."

In October 1980 Charles M. Allen, who had been a member of the first Executive Committee and a member of the Interim Committee before that, proposed that efforts be made to collect records of "the U. of I. retirees association" and even "recollections of older retirees." It was suggested that an oral history approach be used for the latter.

Though references to a chapter history project appear frequently in the minutes from 1981 on, none of the efforts came to fruition until late in the decade. At its December 1981 meeting the Executive Committee appropriated \$1,000 "to reimburse Archives for monthly expense of graduate student(s) processing SUAA, U-C records during 1982, as arranged by the Treasurer of SUAA, U-C and the Director of the Archives." The next reference appears a year later, a notation that it was concluded that the chapter history and the history of the State Universities Retirement System were "closely tied."



In 1984, at the October meeting, another reference to the history project appears: "Anderson (committee member Ruth Anderson) is to approach Robert Sutton if he is interested in supervision of a student to write a history of the local SUAA chapter. Funds were set aside earlier." Subsequent references convey the information that no graduate student was found to work on the history. Consequently, the project was turned over to members of the SUAA-UIUC Executive Committee.

The chapter tried something new in 1980--a spring membership meeting. It was primarily social, but in 1981 the Executive Committee decided to make it informative as well, and engaged Professor Natalia Belting of the History Department as speaker. Her title: "Bats in the Belfry, or The Campus at the Turn of the Century." John Mahaffey, chapter president, and Joe Florio, vice president, greeted the guests and Mary Gilliland played the piano with selections from "her amazing repertory." The site, as it continues today, was the Illini Union South Lounge.

An important announcement at the time was that a new state law had become effective January 1, 1981, providing that:

(1) Any survivor receiving an annuity on or before January 1, 1971, shall have that annuity increased by 1 percent for each full year since the annuity began; and

(2) Any annuitant receiving an annuity on or before that same date shall have the annuity increased one dollar per month for each year of service.

One goal not yet realized gained attention in October 1981 when Florio asked and was granted Executive Committee authorization to investigate the feasibility of a retiree center on the Urbana-Champaign campus similar to one at the University of Washington. It would be used for social purposes and for office operations of the local SUAA chapter.

In the following spring President Dale Greffe and the Executive Committee took notice of a retirement housing project dubbed "Rolling Meadows." A "young lady" had produced a prospectus "covering everything but prices;" its source was identified as "University of Illinois Retirement Community Co., Inc."

Pursuing the matter, SUAA operatives found that the corporation was not listed with the state, and that the University of Illinois had not authorized the use of its name. A call to the listed telephone number yielded information that the subscriber knew nothing about the project except what she had learned from other people calling about the same piece of business.

"Rolling Meadows," it developed, was a fantasy. The "young lady" was a graduate student working on a project in community planning--"or a similar program for compounding consternation through misrepresentation," as an informal addendum to the minutes put it somewhat testily, concluding:

"The dummy phone number she stupidly picked happened to be operational. . . .The whole prospectus was a Ms. conception."

The chapter continued to be financially sound. A committee report given at the May 1982 meeting noted that interest on its \$20,000 bank balance was adequate to cover operational expenses. In June, Dan McClelland, liaison representative, called attention to the support the Chancellor's Office had given to the chapter since 1978 in the production and mailing of the newsletter. The Executive Committee responded with a formal vote of thanks for past assistance and a motion that the chapter take upon itself "all steno and mailing of The Annuitant."

What to do at membership meetings. That has been a perennial problem for program planners. This discussion took place at the February 1983 meeting of the Executive Committee, as reported in the minutes:

"Chancellor Cribbet not available for our spring meeting. Dan Perrino said Medicare 7, 8 or 9 could play. Robinson suggested donation of \$200; no objection. Mauk (program committee chairman) reported that Paul Hurdley (of SURS) would be glad to summarize legislative developments and suggested getting Frances Hinesly (of Busey Bank) to talk about retirement financing--propriety of having a representative of only one bank talk was questioned.

"Someone suggested getting a College of Commerce expert. Van Arsdell said they tended to lecture too long and abstractly. Consensus to have Florio talk about SUAA developments and Hurdley deal with SURS developments and answer questions about retirement financing."

Joe Florio was honored by the state association in 1983 for his work as state president. He received a plaque.

President Greffe reported at the annual meeting in October 1983 on the whereabouts of the 3,500 Urbana-Champaign campus annuitants. According to the Retirement Service roster, 50 lived in Texas, 97 in Arizona, 110 in California, 170 in Florida and 2,570 in Illinois. Of the Illinois residents, 2,100 lived within 50 miles of the campus.

In February 1984, President Walter Johnson informed the Executive Committee that what had been the Chicago Circle chapter had now officially been designated as "State Universities Annuitants Association, University of Illinois at Chicago."

Janet Ward, visiting nurse in the campus Personnel Services Office, became the liaison representative from the Office of the Chancellor in April 1984, succeeding Dan McClelland. She began her tenure with a pertinent question: "What does a member of SUAA get from the Association?" An answer was promised in a forthcoming pamphlet listing past accomplishments and benefits received by annuitants through the years.

A question of policy came before the Executive Committee in April 1984 when the committee received a request for financial assistance for an ongoing scholarship program for nonacademic employees and their dependents enrolled in the University of Illinois or Parkland College. In a discussion of the request at the May meeting, questions were raised as to the propriety of allocation of chapter funds "for any purpose other than to improve the status of retirees and survivors." The committee took no action.

In October 1984 the Executive Committee approved a motion to change chapter operations from the calendar year to a fiscal year ending June 30.

The state association voted in March 1985 to raise state dues from \$1 to \$2 per member per year. This action necessitated a companion change in dues for membership in the local chapter, and the Executive Committee voted to increase chapter fees from \$3 to \$4 for the year beginning July 1, 1985.

Janet Ward and Executive Committee member Leonard Hernecheck received special plaudits from the committee for their efforts in the production of the long-awaited second edition of the pamphlet "Retiree's Guide." Prepared as a cooperative venture of the campus Personnel Services Office, the Office of the Vice Chancellor for Academic Affairs, the Benefits Center, the Office of Public Affairs and the Annuitants Association, the brochure lists services the University provides to its retired employees and the facilities it makes available for their use. This "Retirees Guide" is currently used as the Annuitants Association participates in the UIUC Annual Pre-Retirement Conference.

The editors expressed the hope that the publication would encourage retired faculty and staff members "to continue to participate in the life of the University long after (they) have left its service. We believe that retirement can begin a productive new phase in a staff member's association

with the University, and this guide has been published to facilitate that relationship."

Periodic renewals were promised for the brochure, which first appeared in 1985. This was one area in which the Southern Illinois University chapter of SUAA could, and did, claim precedence. As Clayton records in his historical sketch, the chapter at Carbondale "was the first to provide each annuitant with a printed Retirement Services Manual spelling out the privileges and the services provided by the University to its retirees."

In 1985 the chapter made one of its rare presentations of a certificate of appreciation, this time to Herbert O. Farber, emeritus University vice president for financial affairs and controller. The only other such prize awarded was that to Gibala following his retirement as executive director of SURS.

One thing retirees miss when they leave their campus positions is the popular IlliniWeek, a newspaper made available at no cost to employees. Distribution is through campus offices. When the Executive Committee heard annuitants in appreciable number express the wish that they could get the paper at home, President Marlowe Slater and other chapter leaders set out to fill this need.

The campus Office of Public Affairs, IlliniWeek's publisher, agreed (at the instigation of U. of I. president Stanley Ikenberry) to supply the newspapers but had no funds for distribution. The Executive Committee then decided to make this offer: "Subscribers" could get delivery through U.S. mail for the cost of first-class postage, or \$7.50 for the 33 issues a year. The office of Janet Ward and several volunteers from the Executive Committee would do the addressing, folding and stuffing.

The circulation list quickly grew to nearly one hundred annuitants, then to 150 by the spring of 1988. Reaching the postal service's minimum of 200 for bulk rate mailing would mean the paper could be delivered at a much lower cost.

The year 1986 also brought a change in the chapter's own newsletter, The Annuitant. Issued twice a year, the publication is distributed free to all annuitants from the University's Urbana-Champaign campus--a number approaching 4,000. Apparently well read by the retirees, the newsletter provides information on pertinent legislation, insurance and other such "business" matters, promotes membership and invites annuitants to the spring and fall membership meetings.

Before 1986 the newsletter had been prepared in typescript format. The change gave the periodical a more professional look, achieved through greater attention to typographical design and professional printing. Some change in content also was achieved. To the "information you can use" category was added a section devoted to personal news of retirees, gathered by the editors and directors and solicited from the readers themselves.

The minutes of May 1986 recorded a printing cost of \$847 for the first redesigned issue, continuing: "There was a consensus that the great improvement in The Annuitant was well worth the slight (\$57) increase over the cost of printing last year's letter."

Another sign of the chapter's continued growth and development came in the bonding of the office of the treasurer in the amount of \$25,000 effective June 9, 1986. It was a far cry from the day in 1969 when David Lindstrom suggested that retirees attending an organizational meeting make contributions to reimburse the organizers for the \$187 they had spent in mailing costs.

In the same year President Slater reacted to the increasing complexity of chapter affairs by enlarging the membership committee and giving it cochairpersons, and by establishing, with Executive Committee endorsement, a new standing "committee on procedures."

The latter panel was felt to be needed at that time to facilitate generally the conduct of chapter business. The membership committee restructuring, recommended by the new procedures committee, resulted from the realization, Slater said, that "The responsibilities for maintaining membership files and conducting membership drives are demanding both in the amount of time required and in the continuing nature of the tasks." Furthermore, he said, "the intimate details need to be understood by at least three persons all of whom are prepared to function on short notice."

As a perusal of the minutes reveals, the exact title of the local chapter was, through the years, something less than fixed. In October 1987, at the urging of President Frances Johnson, the title was officially agreed to be "State Universities Annuitants Association: University of Illinois Urbana-Champaign Chapter," with the acronym SUAA-UIUC.

At its final meeting in 1987, on December 9, the Executive Committee reacted to the inevitable and moved to increase its membership dues--the inevitability being a product of the state association's insistence on raising its own membership fees to finance planned expanded activities. The committee adopted two motions, both authorizing changes subject to endorsement of the membership at the spring meeting in 1988.

One of the motions was to amend chapter bylaws to provide that chapter dues, exclusive of the state organization dues, not exceed 75 percent of state dues. The other would set chapter dues at \$7 for fiscal 1988-89--a move that was realistically yet reluctantly taken by the committee members,

who cherished minimum dues assessments just as their predecessors had from the very beginning.

-----

As observed earlier in this account, knowing just what agency or what individual should be credited for advances in the state pension system is difficult. Perhaps no better appraisal could be found than a listing prepared by the state SUAA office late in 1986. Entitled "Summary of Benefits Earned Working Cooperatively for the State Universities Retirement System," it reports:

--Annual increases in pension payments achieved, from 1 1/2 percent of base annuity to 2 percent, and then, in 1980, to 3 percent.

--Maximum annuity for those retiring at age 60 or below increased from 70 to 75 percent in 1977.

--Slight increases in survivor incomes in recent years, including these improvements: Payment of surviving spouses' benefits at age 50 instead of age 55, with survivors' annuity set at 50 percent of retirement annuity; and, monthly benefits no longer terminated if spouse or dependent parent remarries after his or her 55th birthday.

--Cost to purchase credit for public employment at some agency other than the University of Illinois (or other state schools) reduced 20 percent.

--An annuity increase at the rate of \$1 per month for each year of creditable service, effective January 1, 1981, for any member receiving an annuity on or before January 1, 1971.

--An annuity increase at the rate of \$1 per month for each year of creditable service, effective January 1, 1982, for any member receiving an annuity on or before January 1, 1977.



--An increase for survivors effective January 1, 1982, if payment of their annuity began after January 1, 1971, but before January 1, 1981. The increase amounted to 1 percent for each year which had elapsed from the date the survivor's annuity began.

--The annual 3 percent adjustment extended in 1983 to those who retired before August 15, 1969, with fewer than 15 years of service.

A more recent, ad hoc increase became effective January 1, 1987, to wit:

Annuitants who retired on or before January 1, 1977, were given an increase in their monthly retirement annuity equal to 8 cents per year of creditable service times the number of years that have elapsed since the annuity began until January 1, 1987.

According to rules of exposition, this treatise should end on an upbeat theme. In apparent violation of the rule, the subject chosen here is a defeat, not a victory. In a certain sense, however, the subject at hand does represent a real achievement in that it demonstrated the ability of the statewide association to act in concert to attack a problem. All of the dozen chapters of the Annuitants Association contributed to the effort, a phenomenon that may promise continued joint efforts in the future. Here's the story.

Chapter minutes of May 5, 1979, contain this paragraph under the heading "Survivor's Benefits":

"Federal judge in Atlanta, Ga., ruled these nontaxable 'insurance' bought by deceased insured--not state-paid annuities. Huegy and Miller met with local lawyers who had eight clients called in for IRS audits and told these were taxable. Lawyers wanted SUAA, U-C to help locate client willing to sue in Danville federal court, provide retainer, and seek SUAA backing to collect war chest. Mahaffey states no problem locally IF benefits were

reported and identified properly as "insurance." (moot point). Huegy and Miller to investigate further and report at June 5 meeting of SUAA Executive Committee." <sup>UIUC</sup>

This was the situation: Annuity payments to retirees were then and still are subject to federal income tax. Survivor benefits paid following the death of an employee are similarly taxed in some jurisdictions of the Internal Revenue Service, but viewed as insurance benefits in other jurisdictions and thus not taxed. The financial difference to an individual can amount to thousands of dollars.

Except for its ongoing efforts to improve annuities and realize stronger underpinning for the State Universities Retirement System, no issue has consumed more time and energy of the SUAA-UIUC leadership. Between May 1979 and September 1987, half a hundred references to the subject appear in committee minutes.

The state association appointed its president and Joe Florio, president of the UIUC chapter, as a committee to pursue the matter. Our organization promptly appropriated \$500 to support the effort to have the annuity payments established as returns on insurance, and SUAA contributed \$1,000.

Though it thus became a statewide project, the effort centered in the Urbana-Champaign chapter. Florio was named chairman of the committee and, in a significant development, Professor J. Nelson Young of the University of Illinois College of Law volunteered to represent the Annuitants Association and to coordinate legal aspects of local survivors efforts.

By January 1980, the support fund had risen to \$2,300 with the addition of \$800 from other chapters, and subsequent contributions pushed the total far beyond that.

In the meantime, some survivors had been required to pay three years' back income taxes. Nelson Young found that the Chicago office of IRS had granted a refund to a survivor while the East St. Louis office had refused to do so in another case; he requested a uniform ruling. In the spring of 1981 Young announced that he was leaving the University to join the law faculty at the University of North Carolina in Chapel Hill. He reported that the East St. Louis office of IRS had rejected a survivor's claim that SURS payments were insurance, and recommended that SUAA consider suing to reverse that decision.

Subsequently an attorney was hired to bring action in U.S. District Court, Central District of Illinois, Danville, with Young continuing his close interest and guidance to SUAA from his new position in North Carolina.

In the months ahead, Florio and his committee learned how slow the judicial system can be. In November 1982, with action still awaited, he advised that survivors should pay the tax on their SURS payments, but under protest.

The IRS began reaching back to 1979 to collect the disputed tax. Events were proving Nelson Young correct in his random comment that "nothing is likely to cool the ardor of the tax collectors." Some encouragement came in the spring of 1983 when, Florio reported, a new actuary for SURS had stated firmly that survivor's benefits were insurance payments and thus not taxable.

At long last, the issue reached the courts in the form of an action titled Florence Barnes vs. United States of America, dated February 3, 1984. Mrs. Barnes, the plaintiff, was a Champaign resident, the widow of a professor in the U. of I. College of Education. She had been assessed several thousand dollars in income taxes on SURS payments which she had

maintained were untaxable. Representing her were Young and Ralph Swanson, the latter a Danville attorney.

In March 1985 Judge Harold A. Baker ruled in favor of Mrs. Barnes but, as Florio informed the local Executive Committee, the government had 60 days to file notice of appeal. The appeal was forthcoming on May 22, to the U.S. Court of Appeals for the Seventh Circuit, Chicago.

The Association lost its best friend in court in June 1985 when Nelson Young died in Chapel Hill, shortly after returning from a stay in England. Attorney Swanson represented Mrs. Barnes in the appeal hearing in January 1986, and after months of waiting the response came in the fall: The appellate court reversed Judge Baker, thus establishing that survivors' annuity benefits were taxable as income.

In a final effort, the ad hoc state committee recommended that a writ of certiorari be sought from the U.S. Supreme Court. The Urbana-Champaign Executive Committee endorsed such a step, and with Mrs. Barnes' approval the attorneys proceeded. The final word came back in April 1987, leading to this summary in the minutes of the annual membership meeting that spring:

"Florio reported with deep regret that the eight-year-long struggle to get the IRS to recognize the income tax deductibility (as essentially insurance benefits) of SURS survivors' benefits has finally come to an end with the rejection of our appeal to the United States Supreme Court. He said that survivors may rest assured that the time-consuming and expensive efforts have left absolutely no stone unturned in the attempt to obtain what seemed like simple justice for their meager benefits."

Mrs. Barnes wrote, expressing her appreciation for the effort. The state association sent Mrs. Zerla Young a \$500 check in appreciation of her husband's long-continued effort in this case, an effort gracefully and

gratuitously made. She wrote a note of appreciation for the gesture and said she was adding the money to the endowed J. Nelson Young Scholarship in the University of North Carolina College of Law.

After all expenses were paid, more than \$5,000 remained. This was transferred to the state treasury as a legal contingency fund.

The Annuitants Association might fare better in future efforts for one cause or another. It probably would never try harder.

## Preliminary Committee

Roger Adams  
 H. Kenneth Allen  
 Mary Lois Bull  
 Charles E. Herman  
 David E. Lindstrom  
 Charles L. Stewart  
 Ben L. Winchester  
 Bess Riggs Winchester (Mrs. Ben L.)

*Term Expires* Interim Committee *Oct 19, Feb 22 Comm #12*

71 Charles M. Allen  
 72 H. Kenneth Allen  
 71 Mary Lois Bull, Secretary-Treasurer  
 70 Bernita Davies *(replaced Rubin Gubel)*  
 71 Olive Remington Goldman  
 72 Clifford H. James *(repl Leslie James)*  
 71 David E. Lindstrom, Chairman Pro Tem  
 71 Carrie McGreevy  
 70 Ray I. Shawl  
 70 Charles L. Stewart, Chairman  
 72 Ernest L. Stouffer  
 71 Fred H. Turner

## 1971

Charles M. Allen  
 H. Kenneth Allen  
 Marion Frances Berry  
 Mary Lois Bull, Secretary-Treasurer  
 Bernita Davies  
 Olive Remington Goldman  
 Clifford H. James  
 David E. Lindstrom, Vice President  
 Carrie McGreevy  
 Ray I. Shawl  
 Everett G. Smith  
 Charles L. Stewart, President  
 Ernest L. Stouffer  
 Fred H. Turner

## 1972

Charles M. Allen, Vice President  
 H. Kenneth Allen  
 Mary Lois Bull, Secretary-Treasurer  
 Bernita Davies  
 Olive Remington Goldman  
 Clifford H. James.  
 Muriel Libby  
 David E. Lindstrom, President to  
 January 1972  
 Ray I. Shawl, President from January  
 1972

Everett G. Smith  
 Julia Snyder  
 Charles L. Stewart  
 Ernest L. Stouffer  
 Fred H. Turner

## 1973

Charles M. Allen, Vice President  
 Mary Lois Bull, Secretary-Treasurer  
 Marion Corzine  
 Harris F. Fletcher  
 Olive Remington Goldman  
 Charles S. Havens  
 Clifford H. James  
 Muriel Libby  
 David E. Lindstrom  
 William A. Neiswanger  
 Charles W. Sanford  
 Ray I. Shawl, President  
 Everett G. Smith  
 Fred H. Turner

## 1974

Charles M. Allen  
 Mary Lois Bull, Secretary-Treasurer  
 Marion Corzine  
 Harris F. Fletcher  
 Olive Remington Goldman  
 Charles S. Havens, Vice President  
 Harvey W. Huegy  
 Clifford H. James  
 Chester O. Jackson  
 Muriel Libby  
 David E. Lindstrom  
 William A. Neiswanger  
 Charles W. Sanford  
 Ray I. Shawl, President  
 Everett G. Smith  
 Fred H. Turner

1975

Joseph E. Blaze  
 Mary Lois Bull, Secretary-Treasurer  
 Marion Corzine  
 Herbert O. Farber  
 Harris F. Fletcher  
 Harold I. Haugaard  
 Charles S. Havens, Vice President  
 Harvey W. Huegy  
 Chester O. Jackson  
 Clifford H. James  
 Muriel Libby  
 William A. Neiswanger  
 Charles W. Sanford, President  
 Ray I. Shawl  
 Fred H. Turner

1976

Joseph E. Blaze, President  
 Leslie E. Card  
 Pauline V. Chapman, Secretary  
 Ray Eliot  
 Herbert O. Farber  
 A.E. (Joe) Florio  
 Harold I. Haugaard, Treasurer  
 Charles S. Havens  
 Harvey W. Huegy, Vice President  
 Laura J. Huelster  
 Alice S. Hurt  
 Muriel Libby  
 Reid T. Milner  
 Glen A. Pickens  
 Charles W. Sanford

1977

John C. Bailar  
 Joseph E. Blaze, President  
 Leslie E. Card  
 Pauline V. Chapman, Secretary  
 Ray Eliot, Vice President  
 A.E. (Joe) Florio  
 Harold I. Haugaard  
 Charles S. Havens  
 Harold W. Huegy  
 Laura J. Huelster  
 Alice S. Hurt, Treasurer  
 Muriel Libby  
 Reid T. Milner  
 Glen A. Pickens  
 Allen S. Weller

1978

John C. Bailar  
 Joseph E. Blaze  
 Leslie E. Card  
 James C. Colvin  
 Ray Eliot  
 Earl F. Finder  
 A.E. (Joe) Florio, President  
 Charles S. Havens  
 Zelma C. Holl, Secretary-Treasurer  
 Harold W. Huegy  
 Laura J. Huelster, Vice President  
 Alice S. Hurt  
 Vernon L. Kretschmer  
 Wendell E. Miller  
 Reid T. Milner  
 Glen A. Pickens  
 Allen S. Weller

1979

Mary H. Arbenz  
 John C. Bailar  
 Earl F. Finder  
 A.E. (Joe) Florio, President  
 C. Dale Greffe  
 Alfred W. Hubbard, Secretary  
 Harold W. Huegy  
 Alice S. Hurt  
 Vernon L. Kretschmer, Vice President  
 John C. Mahaffey, Treasurer  
 Wendell E. Miller  
 Allen V. Sapora  
 Allen S. Weller

1980

Mary H. Arbenz  
 Lester E. Elliott, Treasurer  
 Earl F. Finder  
 A.E. (Joe) Florio  
 Karl E. Gardner  
 C. Dale Greffe  
 Alfred W. Hubbard, Secretary  
 Peggy Hubbard (Mrs. Alfred W.)  
 Alice S. Hurt  
 Vernon L. Kretschmer  
 John C. Mahaffey, Vice President  
 Wendell E. Miller, President  
 Allen V. Sapora

1981

Mary H. Arbenz  
 Lester E. Elliott  
 Karl E. Gardner  
 C. Dale Greffe, Vice President  
 Virginia Guthrie  
 Alfred W. Hubbard, Secretary  
 Peggy Hubbard (Mrs. Alfred W.)  
 Morris S. Kessler, Treasurer  
 Vernon L. Kretschmer  
 John C. Mahaffey, President  
 Wendell E. Miller  
 Allen V. Sapora  
 Paul M. Van Arsdell

1982

Lester E. Elliott  
 Karl E. Gardner  
 C. Dale Greffe, President  
 Virginia Guthrie  
 Alfred W. Hubbard, Secretary  
 Peggy Hubbard (Mrs. Alfred W.)  
 Walter M. Johnson  
 Morris S. Kessler, Treasurer  
 Vernon L. Kretschmer  
 John C. Mahaffey  
 Mary F. Mauk  
 Stanley C. Robinson  
 Paul M. Van Arsdell, Vice President

1983

Ruth Marie Anderson  
 Lester E. Elliott  
 Karl E. Gardner  
 C. Dale Greffe, President  
 Virginia Guthrie  
 Alfred W. Hubbard, Secretary  
 Walter M. Johnson  
 Morris S. Kessler, Treasurer  
 Seichi Konzo  
 Vernon L. Kretschmer  
 John C. Mahaffey  
 Mary F. Mauk  
 Stanley C. Robinson  
 Paul M. Van Arsdell, Vice president

1984

Ruth Marie Anderson, Vice President  
 Lester E. Elliott  
 Karl E. Gardner  
 C. Dale Greffe  
 Leonard G. Hernecheck, Treasurer  
 Kathryn R. Hill  
 William R. Horsfall  
 Walter M. Johnson, President  
 Seichi Konzo, Secretary  
 Mary F. Mauk  
 Robert W. Mayer  
 Stanley C. Robinson

1985

Ruth Marie Anderson  
 Lester E. Elliott  
 A.E. (Joe) Florio  
 Karl E. Gardner  
 C. Dale Greffe  
 Leonard G. Hernecheck, Treasurer  
 Kathryn R. Hill  
 Frances L. Johnson  
 Walter M. Johnson, President  
 Seichi Konzo, Secretary  
 Stanley C. Robinson  
 J. Marlowe Slater, Vice President  
 Joe C. Sutton

1986-87

Ruth Marie Anderson  
 A.E. (Joe) Florio  
 Roy J. Helfinstine  
 Leonard G. Hernecheck, Treasurer  
 Kathryn R. Hill  
 Frances L. Johnson, Vice President  
 Walter M. Johnson  
 Robert W. Mayer, Secretary  
 King J. McCristal  
 Stanley C. Robinson  
 J. Marlowe Slater, President  
 Joe C. Sutton



1987-88

Ruth Marie Anderson  
Robert W. Evans  
A.E. (Joe) Florio  
Roy J. Helfinstine  
Leonard G. Hernecheck, Treasurer  
Frances L. Johnson, President  
Walter M. Johnson  
Robert W. Mayer, Secretary  
King J. McCristal  
Betty A. Richards  
Stanley C. Robinson  
J. Marlowe Slater

The original constitution

CONSTITUTION

University of Illinois, Urbana Campus, Annuitants' Association

1. This organization shall be known as the University of Illinois, Urbana Campus, Annuitants' Association.
2. The purpose of the organization shall be to promote the individual and collective interests of its members.
3. Membership in this organization shall be open to all Urbana Campus University of Illinois Annuitants, academic, nonacademic and allied organizations under the State Universities Retirement System of Illinois, or (1) who are within one year of retirement which will make them eligible for such annuity or (2) who are spouses or the surviving spouses of such annuitants.
4. The affairs of the organization shall be administered by an Executive Committee of twelve members. The members of the Interim Executive Committee, whose terms of one to three years have been determined by lot, shall serve until they are replaced by election. At the meeting at which this Constitution is adopted, four members shall be elected, two academic and two nonacademic, to replace those whose terms expire in the fall of 1970. Thereafter, four members shall be elected, two academic and two nonacademic, for three-year terms at each annual fall meeting to fill the positions being vacated. Members of the Committee shall be eligible for re-election for only a second term, but the outgoing Chairman shall continue for one year as a voting member of the committee.

The Executive Committee shall elect from its own membership a President, a Vice-President, and a Secretary-Treasurer. These officers shall also serve in the same capacity for the Association.

Vacancies on the Executive Committee shall be filled, for unexpired terms, by vote of the members of the Committee.

A majority of the membership of the Executive Committee shall constitute a quorum.

5. The Executive Committee shall appoint such committees as will further the work of the Association, shall arrange a fall meeting of the Association and such other meetings as shall be deemed desirable. At each regular or special meeting the Executive Committee shall report its activities and the activities of any other committees of the Association since the time of the last Association meeting.
6. Each year prior to the annual fall meeting, the President, with the advice of the other members of the Executive Committee, shall appoint a Nominating Committee, which then shall select candidates, both academic and nonacademic, for the four Executive Committee positions being vacated, and shall present the names of these nominees to the membership at the annual fall meeting of the Association. Additional nominations from the floor shall be requested.

7. Consultants may be invited to attend meetings of the Executive Committee or of the Association.
8. The dues of the Association shall be \$2.00 per year, per member, due at the time of the annual fall meeting. The Executive Committee is authorized, as need for funds arises, to levy an assessment not to exceed \$2.00 per member during one year. Any additional assessment must be authorized by the Association at a regularly called meeting, notice of which has been given to members not less than one month prior to the voting. The Executive Committee may also receive donations.

The financial records of the Secretary-Treasurer shall be audited annually by a special committee and reported at the annual fall meeting.

9. Amendments to this Constitution may be proposed by the Executive Committee or by not less than fifteen members of the Association. They may be adopted at any regularly called meeting of the Association by a two-thirds vote of the members present. Notice of proposed changes shall be given to members at least a month in advance of the meeting.

Adopted April 1, 1970.